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Preface

The Transition to Support (TTS) process guide is intended for use as a reference guide for those individuals within Student Financial Assistance (SFA) with a need to manage transitioning activities from the development group to the support or maintenance group.

This process guide is consistent with the Solution Life Cycle (SLC) guidelines, in that it is used as a framework, which incorporates processes from the Solutions Acquisition Capability Maturity Model (SA – CMM). The processes used within this guide are also consistent with the requirements of the SFA Modernization Blueprint.

In this document references are made to activities described within the Configuration Management (CM) Process Guide, and the Solution Acquisition Planning (SAP) Guide.



1.0 INTRODUCTION

Transition to Support Summary

The purpose of Transition to Support is to ensure that a solution support organization is identified, funded, trained, and in place when support activities need to begin within the solution development process.

Transition to Support activities include:

- Providing for maintenance funding.
- Identifying an appropriate solution support organization in time for that organization to prepare for the transition.
- Identifying coordination personnel from the development organization who will assist the solution support organization.
- Training coordination and solution support personnel as needed.
- Identifying and providing for the transition of the solution products being acquired.
- Transferring pending Change Requests (CRs) and cutting over to daily maintenance responsibilities in an orderly fashion.

Transition to support typically begins with the development of the business case for development. The Executive Sponsor ensures funds are allocated within the business case for long-term support of the system being acquired and for specific transitioning activities as appropriate. *See Appendix B for the TTS Plan Template and Section 3.12 in the SAP Process Guide for how the TTS Plan fits within Solution Acquisition Planning.*

Transition to Support involves developing and implementing the plan to transition the acquired solution products to the solution support organization. The Integrated Product Team (IPT) provides for an orderly, smooth transition of the solution from the contractor responsible for development to the support organization responsible for solution support. The IPT may have periods of joint development and maintenance requiring maintenance funding. TTS does not address the periods of joint development and maintenance. TTS addresses the transition **from** the IPT **to** a new organization.

The support organization responsible for maintaining the system is typically identified by the acquiring organization (SFA) in the Vision Phase as part of the business case, to ensure seamless transition activities between development and support organizations. In multi-year projects, the identification of the solution support organization may be too early for the funding process. The acquiring organization (SFA) will identify maintenance funding as part of the business case and will identify the permanent solution support organization as early as possible.

The TTS Process Guide supports the following goals:

- The solution support organization has the capacity to provide the required support upon assumption of responsibility for the solution products.
- Continuity of support of solution products is seamless to the acquiring organization during transition from the contractor developer/maintainer to the solution support organization. This process is measured by service level agreements.
- Configuration management activities are maintained throughout the transition.



2.0 PROCESS GUIDE SUMMARY

Guide Content

Transition to Support and the Solution Life Cycle

This section highlights the activities and products/actions for TTS for each phase of the SLC. A diagram is provided as a quick reference of the activities occurring in each phase. Following the diagram is a detailed description of the actions and products/outcomes in each phase.

Transition Process

This section explains the steps involved in transitioning a system from the developing organization, which may also perform support functions during and past its development tenure to the Solution Support Organization.

Transition to Support Appendices

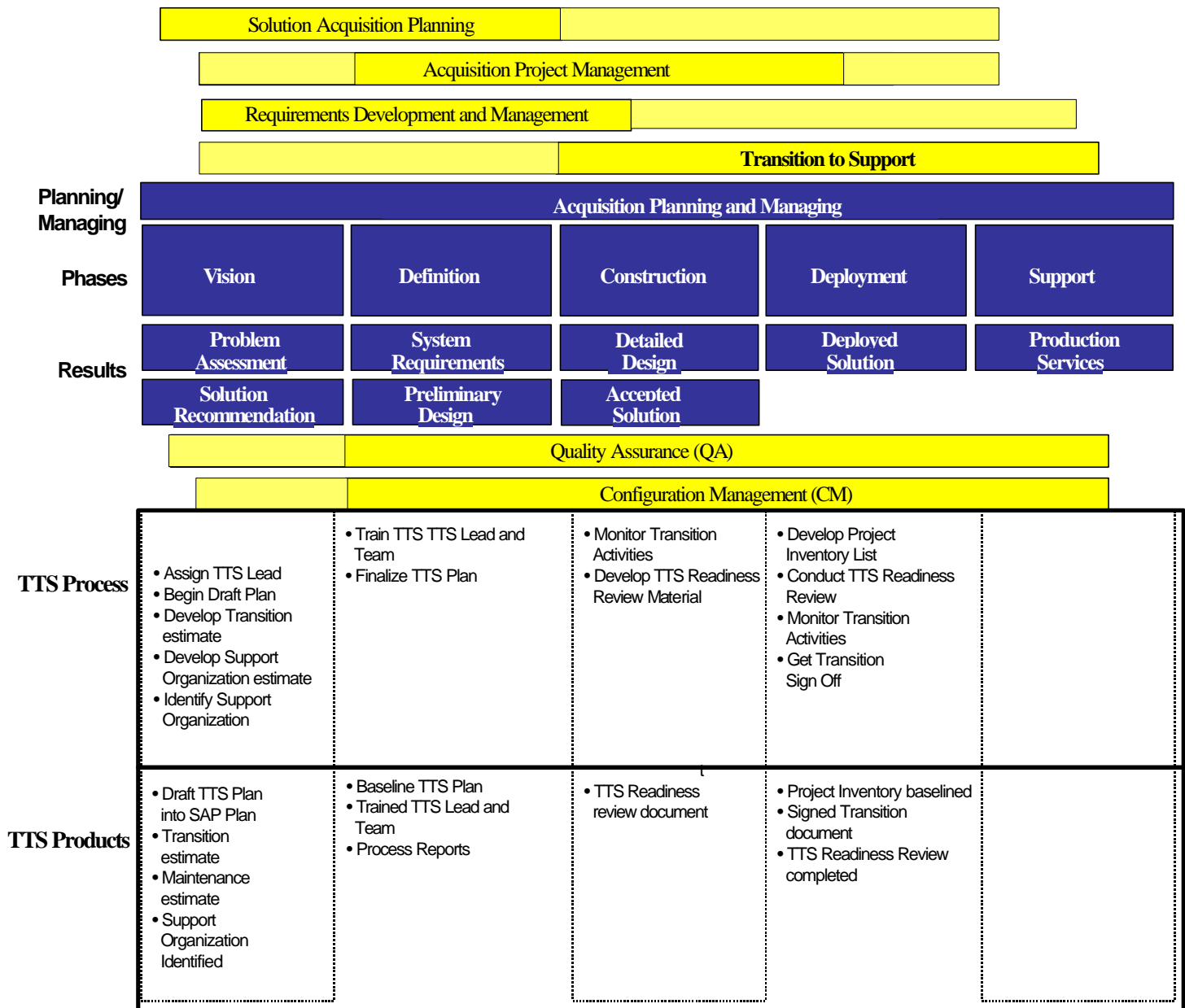
This section contains a TTS Readiness Review Checklist (Appendix A) and a Plan Template (Appendix B).



Transition to Support and the Solution Life Cycle (SLC)

2.1.1 Introduction

The following diagram illustrates the activities and products/outcomes of TTS in each phase of the SLC. Subsequent sections provide detail on the activities and products/outcomes.





2.1.2 Vision Phase

- **Assign SFA TTS Lead**- An SFA TTS lead is designated by the System Executive Sponsor and is intended to become the SFA System Manager when the system enters the Support Phase. The Project Manager may also appoint an IPT TTS Lead. The SFA TTS Lead heads the effort in the initial planning of activities. This role is a permanent position distinct from that of Project Manager.

The TTS Lead responsibilities include:

- ☐ Training the TTS staff
 - ☐ Developing the TTS Plan
 - ☐ Developing transition and solution support organization budget estimates
 - ☐ Coordinating the Solution Acquisition Organization's choice or shortlist of Solution Support Organizations
 - ☐ Coordinating the transition training of the developing organization coordinators
 - ☐ Coordinating the transition training of the solution support organization
 - ☐ Coordinating the solution product inventory and hand-over to the solution support organization
 - ☐ Coordinating the TTS readiness review of the solution support organization
 - ☐ Coordinating the transition sign-off activity
- **Draft the TTS Plan** - The TTS draft plan should include a general idea of resources needed for TTS planning and preparation. The TTS plan should include a brief description of the TTS process. The TTS lead will create the draft plan for Transition. If a solution support organization is required for the project, the TTS lead should document the TTS plan as part of the project work plan (see the Solution Acquisition Planning Process Guide for more detail), even though specific TTS activities may not be known at the time. This plan would include a schedule with estimated times for transition activity tasks.
 - **Develop Transition Estimate** – The transition estimate is included in the development of the business case.
 - **Develop Support Organization Estimate** – The support organization estimate is included in the development of the business case.

2.1.3 Definition Phase

- **Train TTS Lead and Team** - Assemble the necessary resources and personnel needed to establish the TTS lead and team. The TTS lead ensures that support staff, project team members and affected users are familiar with their TTS roles and responsibilities.
- **Finalize TTS Plan** - The TTS plan is approved by the IPT project manager in conjunction with the sign-off of the project work plan by the Executive Sponsor. The TTS plan must be maintained throughout the Support Phase of the project life cycle. The TTS lead is responsible for maintaining the TTS plan.
(Refer to TTS Plan Template in Appendix B).
- **Status Reporting** - Administratively track and report all transition items. Before beginning transition activities, the TTS lead and project manager should establish the standards for status reporting transition to support activities. This involves establishing how often status reports are created, standard status reporting document used, and to whom the status report will be delivered.



2.1.4 **Construction Phase**

- **Monitor Transition Activities** - The TTS lead and representatives from the key affected groups are kept up to date on the progress of transition activities.
- **Develop TTS Readiness Review Material** – Prepare documentation to be used in the TTS readiness review.

2.1.5 **Deployment Phase**

- **Develop Project Inventory List** – A draft of the project inventory list is produced by the development organization and given to the support organization. The SFA TTS lead and the Executive Sponsor review this draft.
- **Conduct TTS Readiness Review** – Update the TTS Readiness Review document and review it with the solution support organization.
- **Monitor Transition Activities** – The project manager and the TTS lead monitor the transition cutover activities to ensure a seamless transition.
- **Draft Transition Sign-Off** – As the transition activities approach completion, the Executive Sponsor Sign-off document is prepared.
- **Transition Sign-Off** – The Executive Sponsor signs the transition sign-off document once a successful transition has occurred.



3.0 TRANSITION PROCESS

INTRODUCTION

PURPOSE

The Transition to Support (TTS) Main process is used throughout the phases of the Solutions Life Cycle. The purpose is to chart, at a high level, what transition activities need to occur in terms of the Support needs of SFA for the effective maintenance of the acquired system.

BENEFITS

- Provide an organized and seamless transition of the acquired system from the Development to the Support Organization
- Provide a systematic process enabling uninterrupted operation of the acquired system.
- Enable the Acquiring Organization to evaluate the Support Organization.
- Confirm acquired solution components, to be transitioned, are compliant with the configuration management process throughout the transition period.

ENTRY CRITERIA

Envisioned IT Solution Requires New Support Organization

When an Information Technology (IT) Business Need is identified, the first step is the creation of a Solution Acquisition Planning (SAP) Group. This group decides whether or not support is required for the envisioned solution. When it is determined that support (also known as maintenance) is required for the Project, the Transition to Support (TTS) Process begins. Occasionally, a one-time-use system is developed that does not require support.

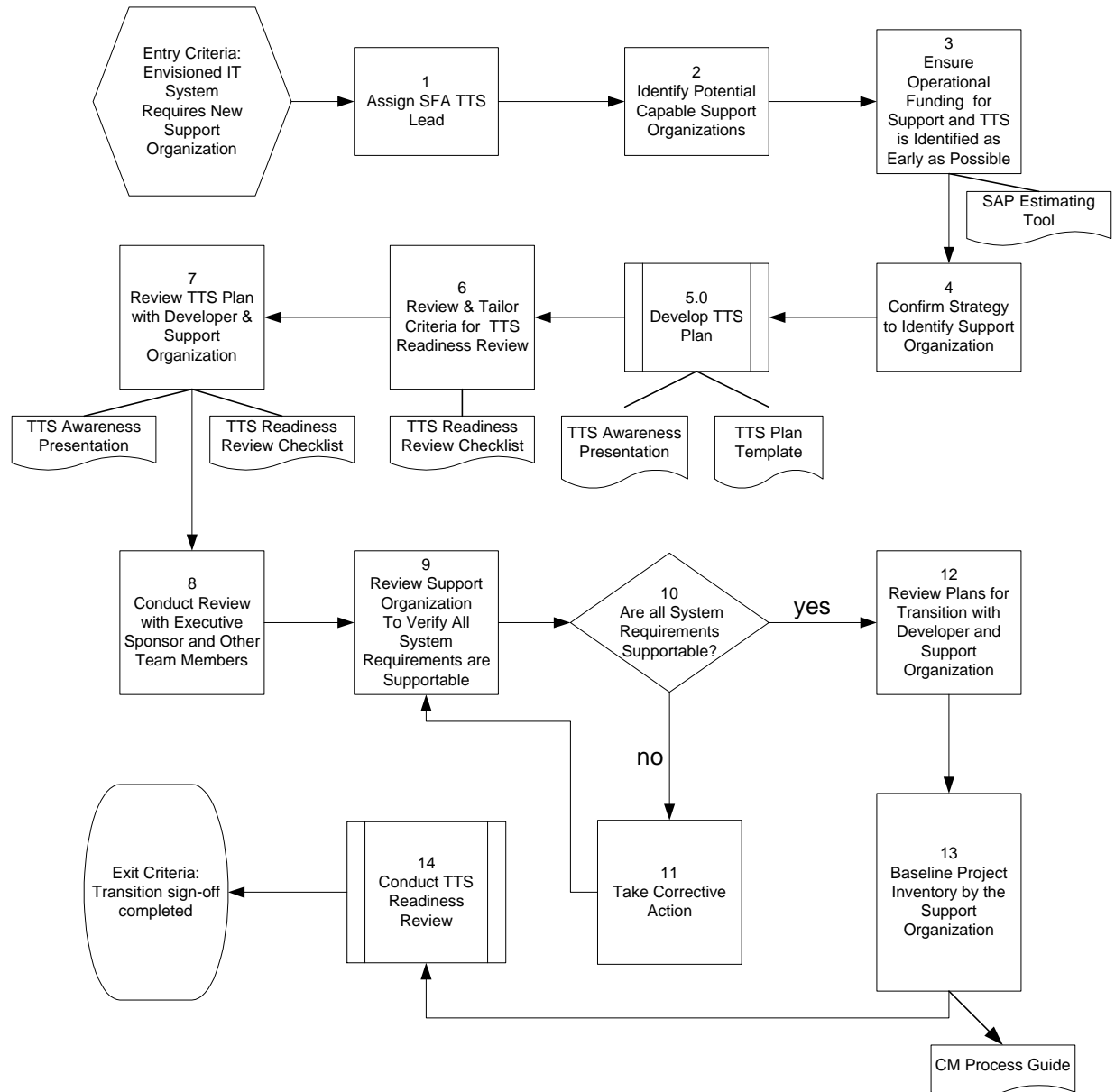
IMPORTANT NOTE: *The Transition to Support Team Lead has the responsibility for the accomplishment of each process step, unless otherwise stated. Accordingly, the process steps are addressed to the TTS Lead.*



PROCESS FLOW CHARTS

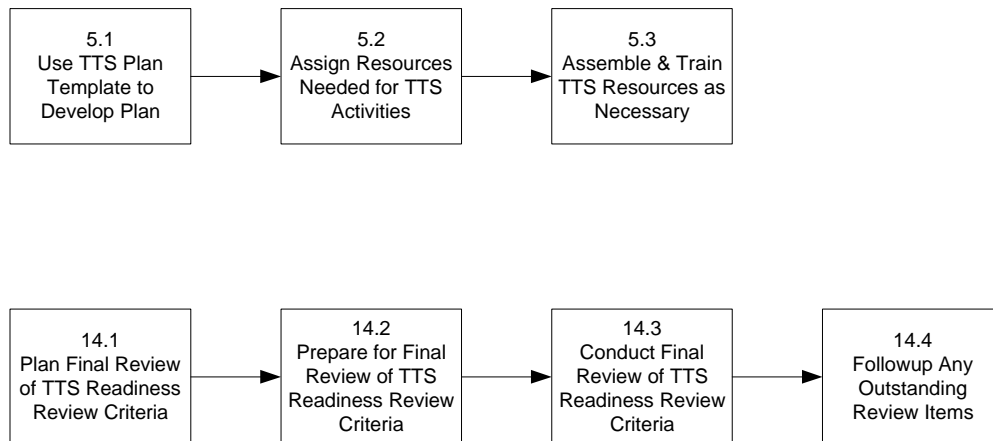
MAIN PROCESS

NOTE: The identification of the Support Organization should be in the Vision Phase. This decision is not always feasible at that time. The identification of the Support Organization must be made no later than the Construction phase (Step 12) in which case many of the steps are delayed until that phase.





SUB-PROCESSES





PROCESS FLOW STEPS

3.1.1 Vision Phase Steps

1. Assign SFA TTS Lead

This first step of the TTS process occurs in the Vision Phase of the Solution Life Cycle (SLC). The Executive Sponsor designates the SFA TTS Lead. Because the TTS Team is normally an Integrated Product Team, the TTS Lead position is staffed by an SFA resource and generally supported by a Modernization Partner resource. The SFA TTS Lead is normally intended to become the System Manager in the Support Phase, accountable for on-going system operations. It is important to begin planning for TTS in the Vision Phase because it is essential that the need for support funding be recognized as early as possible in the SLC. The TTS Lead must be finalized in all cases before completion of the Definition Phase.

2. Identify Potential Capable Support Organizations

SFA has a number of potential support organizations from which to choose the support organization(s) for a particular project. Most often, these organizations have provided support in the past and have a proven capability and “track record”. Further information regarding these organizations’ capability can be obtained through the use of a questionnaire or by checking references provided by the organizations. If a solicitation process is used to determine the support organization, then this information will be available as part of the solicitation process. Occasionally, more than one support organization may be working concurrently. For example, one organization may staff a help desk to assist end users while another organization maintains and updates the solution on the technical side (e.g. “fix the bugs”) in the system. In this scenario the TTS Plan must address more than one support organization.

3. Ensure Operational Funding for Support and TTS is Identified as Early as Possible

When a new project begins, the term “Identified” means that requests for operational funding and for the TTS effort are included in the Business Case. In other scenarios such as when a legacy system needs support, the funds for support and TTS may come from operational funds. The TTS Lead must be familiar with both the budget process for operational funding and the IRB Business Case funding process.

Estimated amounts of funding dedicated to both support and TTS efforts for the project can be obtained from the funding of projects that are of similar size and have similar support needs. Allowances should be made for the increased complexity and coordination required if more than one support organization is involved.

Operational funding and budget estimates for each year of the project budget cycle are put in the Business Case. There has to be consideration of what budget year the funding is coming from. A request for funding is also included in the separate annual budget process and is updated and justified annually. In addition, the Business Case funding requirements are reviewed and updated at least annually, or when budget estimates become more precise. For long-term projects, such as Share-in-Savings, the identification of funding for support may occur past the budget time frame.

(Refer to: SAP Estimating Tool in SAP Process Guide Appendix)

4. Confirm Strategy to Identify Support Organization

The Support Organization is selected or at least the strategy to identify the Support Organization is confirmed in the TTS Plan. Accordingly, as soon as the Support Organization is selected, the TTS Lead needs to contact the individual or group from the Support Organization responsible for planning the support of the project.



3.1.2 Definition Phase Steps

Although it is desirable to identify the Support Organization in the Vision phase, the decision is not always feasible. The identification of the Support Organization may be delayed until no later than the Construction Phase. These steps may slide to the Construction Phase.

5. *Develop TTS Plan*

Note: The Plan can be updated and modified to fit changing requirements for support or upon review by the Executive Sponsor. (See Process Step 8). (*Refer to: TTS Awareness Presentation and TTS Plan Template in Appendix B*)

5.1 *Use TTS Plan Template to Develop Plan*

Use the TTS Plan Template as a guide to establishing a TTS Team and the TTS Plan. The structure and time frame of the Plan must be tailored to the project model used to develop and support the solution. It is important to understand the structure of the solution to appropriately address the project needs for support. The TTS Plan should document the support requirements, which are derived from the system requirements.

5.2 *Assign Resources Needed for TTS Activities*

Resources to plan and manage the Transition to Support, including staff, equipment and tools must be identified and assigned to the TTS Team. Funds for the TTS effort were to be dedicated previously (Refer to Process Step 3). Roles and responsibilities within the TTS Team must be assigned. A schedule of TTS activities should be drafted. The designated resources should be documented in the TTS Plan.

5.3 *Assemble & Train TTS Resources as Necessary*

The acquiring organization provides experienced support management personnel to support the TTS effort. Experience means having participated in a solution acquisition management role on at least one other project and having participated in supporting solutions for at least two years.

6. *Review and Tailor Criteria for TTS Readiness Review*

This step is an important key to the process of TTS and ensuring a coordinated “handoff” between the Developer and the Support Organization. Determine which criteria in the TTS Readiness Review Checklist apply to the TTS of the project in question. Communicate these to both the Developer and the Support Organization. The exit criteria for the TTS process as a whole are that these TTS Readiness Review criteria are met. The TTS Readiness Review is separate and distinct from the Production Readiness Review (PRR). Normally the TTS Readiness Review is conducted before the PRR. (Refer to Process Step 14). (*Refer to the TTS Readiness Review Checklist in the Appendix*)

7. *Review TTS Plan with Developer & Support Organization* - Review the responsibilities, roles, and the schedule contained in the plan. Review the salient aspects of TTS activities, including a work breakdown (e.g. Microsoft Project) and an issue tracking mechanism. Invite comments on the TTS Plan and make appropriate modifications. Ensure that both the Developer and the Support Organization are coordinating their efforts in adherence to the guidelines of the TTS plan. In step 12, the modified TTS plan will be reviewed. (*Refer to the TTS Readiness Review Checklist and TTS Awareness Presentation in the Appendices*)

8. *Conduct Review with Executive Sponsor and Other Team Members*

The Executive Sponsor and other team members review the current TTS plan.



9. *Review Support Organization to Verify All System Requirements are Supportable*

As requirements development proceeds in the Definition Phase, a representative of the Support Organization should verify that the capability to support the system requirements is available. If the Support Organization does not currently have that capability it must verify whether or not it can reasonably acquire that capability. The TTS Lead should identify the requirements for support and document them in the TTS Plan or in a Statement of Objectives. The TTS Lead should also review support requirements changes to ensure that they do not conflict with system requirements.

10. *Are all System Requirements Supportable?*

If all System Requirements can be supported proceed to step 12. If all System Requirements cannot be supported proceed to step 11.

11. *Take Corrective Action*

Take the necessary actions to ensure that all System Requirements are appropriately supported.

3.3.3 Construction Phase Step

Although it is desirable to identify the Support Organization in the Vision phase, the decision is not always feasible. The identification of the Support Organization may be delayed until no later than the Construction Phase. Steps from earlier phases may slide to the Construction Phase.

12. *Review Plans for Transition with Developer and Support Organizations*

Note: The TTS Plan can be updated and modified to fit changing requirements for support or upon review by the Executive Sponsor. (See Process Step 8). (*Refer to: TTS Awareness Presentation and TTS Plan Template in Appendix B*)

The TTS Team reviews the transition plan created and modified to ensure it meets the criteria of the TTS Readiness Review. The scale of the review effort is based on the scale of the project. One model is for the Developer and the Support Organization to operate the solution in parallel during the “handoff” period, as responsibilities for operating and maintaining the solution are repositioned in phases from the Developer to the Support Organization.

3.3.4 Deployment Phase Steps

13. *Baseline Project Inventory by the Support Organization*

This step ensures that the support organization receives a complete inventory of system products that are to be transitioned. It is important to involve the Project Configuration Lead. These products should be the latest versions of each product contained in the Configuration Management Item Index.

It is essential to ensure that the Developer Organization maintains control of its library until the actual transfer of operational control to the Support Organization; that the TTS Team in conjunction with the Configuration Manager oversees the transfer; and that the Support Organization receives a complete set of documents to baseline in preparation for assuming configuration control of the system products. (*Refer to CM Item Configuration Index in the CM Process Guide*)



14. Conduct Review Process

Schedule and conduct the TTS Readiness Review to ensure that the all TTS Readiness Review criteria that were selected for the project have been met. (See Step 6)

14.1 Plan Final Review of TTS Readiness Review Criteria

Use plan template and list of criteria to create a plan for the final review.

14.2 Prepare for Final Review of TTS Readiness Review Criteria

Assemble needed materials, schedule appropriate facilities, notify the appropriate personnel.

14.3 Conduct Final Review of TTS Readiness Review Criteria

Ensure that the appropriate leadership is present and that the secretariat is there to both record minutes and distribute needed materials. Determine if all criteria have been met or if there is still any unfinished business.

14.4 Follow-up Any Outstanding Review Items

Create a list of unfinished business items and continue to coordinate the list until all criteria have been fulfilled.

Exit Criteria: Transition sign-off completed

The Executive Sponsor determines that the transition is complete and signs the sign-off document.

**APPENDIX A – TTS READINESS REVIEW CHECKLIST**

Note: Here are some examples of TTS Readiness Review Criteria. These should be tailored to the project scope and needs for support.

Criteria Description	Gap Y/N	Comments Are Criteria Required?	Work Effort	Target Completion Date	Status	Responsibility	Risk Identified	Proposed Risk Mitigation
TRANSITION								
Business Case includes application maintenance funding								
Software support organization identified								
Help desk support organization identified								
Transition to support coordination team exists								
Transition to support team has a documented plan (includes knowledge transfer)								
Support organization(s) organizational design(s), skills, and capacity confirmed								
Software support organization has a complete inventory of all software and related items that are to be transitioned								
Open SIR Responsibility Identified and Agreed Upon								
Software and help desk support available for solution products								
Cutover date(s) agreed								



APPENDIX B - PLAN TEMPLATE

<<Template Procedures>>

<<This template document should be developed using the project's Business Case and Solution Acquisition Plan as guidance for this plan. The plan is developed in accordance with the Solution Life Cycle (SLC). The Transition to Support (TTS) plan is to be created during the vision phase of the SLC and maintained throughout the definition, construction, and deployment phases as specified in the TTS Process Guide. Note: All instructions that are in these "<<... >>" brackets should be removed. >>

B.1 INTRODUCTION

Purpose

This document is a Student Financial Assistance (SFA) planning tool to be used for planning and managing the transitioning of the << insert project name>> project. Its purpose is to establish reasonable plans for performing transition to support activities throughout the acquisition life cycle. Refer to the Transition to Support policy for further clarification of SFA's commitment to planning, and managing transition of the solution.

Acquisition Summary

<<Briefly describe this acquisition. Define the operational needs, key operational effectiveness, and or suitability issues that must be addressed by this acquisition. This section is summarized in the Business Case and can also be copied here. >>

Transition To Support Objectives

The purpose of Transition to Support for the << Insert Project Name>> project is to provide transition of the solution products being acquired to the eventual solution support organization. The necessary resources are identified, budgeted for, and are available when needed. The designated solution support organization is fully prepared to accept responsibility of the solution products in time to ensure uninterrupted support.

Constraints/Risks

<< Reference Solution Acquisition Planning (SAP) for project acquisition constraints and risks. >>



B.2 REFERENCES

<< Identify documents referenced by this plan or used in the development of this plan. List the title, version, date, and owner of the document. Refer to the table below as a guide. >> For example: SAP Plan, RDM Plan, etc.

Title	Version and Date	Document Owner
<i><<Insert Document Title>></i>	<i><<Insert Version/Date>></i>	<i><<Insert Document Owner>></i>

B.3 PLANNING

Identify Team Lead

<<Select TTS Team Lead. Identify the resource that will serve as SFA's TTS Team Lead. Identify the skills needed for this role. >>

Resources

<< In this section the project manager selects resources with adequate skills needed to handle the transition activities for the project as it pertains to the solution being acquired. As the project progresses or as the solution is acquired, the project manager projects a list of additional skills or skill set needed in the future for transition of the solution. Allowing for early planning for additional resources. >>

Funding

<< Work with Solutions Acquisition Planning (SAP) Team Lead in the development of the business case. Ensure preliminary funding is allocated for Transition Efforts within the Business Case. Plan initial budget estimation for Transition to Support Efforts. The Executive Sponsor sign - offs authority to the TTS project manager to access and use funds allocated within the business case to complete transition to support activities. >>



B.4 TRANSITIONING

<<Describe the transition to support activities in this plan or reference. The Development Organization and the Solution Support Organization will have their own transition plan which will collaborated upon. >>

Transition Preparation

<<Describe the preparation for the transition, including any necessary coordination with the client and/or the support organization. Define team dependencies and responsibilities. Obtain agreements on commitments to perform. Describe how the support organization's readiness to accept the work product will be confirmed, and what reports will be produced. >>

Transition Inventory

The following is an inventory of all software and solution related items that must be transitioned to the support organization.

<<Develop a complete inventory of the items. The inventory may include items such as, software descriptive documentation, support software, reusable software assets, pertinent data from the corrective action, configuration management solutions, and maintenance documentation. Define warranty and data rights provisions, if applicable. Also describe how these rights will be protected. Describe how and where the library will be developed and maintained. >>.

Transition Configuration Control

*<< Describe or reference the configuration management methods and tools used to maintain control through the transition. **Reference the Configuration Management Process Guide.** >>*

Transition Schedule

<<Define resources, milestone, and schedules. The high-level milestones should appear here, but the detailed schedule may be maintained in an scheduling/tracking tool. >>

Transition Readiness

*<< The acquiring organization ensures that the developing organization and solution support organization have collaborated transition plans. The solution support organization undergoes transition readiness test verifying their capability to support the solution. **Reference the TTS Readiness Checklist.** >>*

Transition Constraints/Risks

<< Identify the constraints or risks with the actual transitioning activities. Identify any transitioning dependencies. >>

Transition Status Reporting

<<Define the status-reporting requirements or procedures for the project. Plan and schedule periodic reviews with project, software support, and acquisition management representatives. >>



APPENDIX C – BUSINESS CASE TTS/OPERATIONAL FUNDING ESTIMATES

C.1 INTRODUCTION

It is very important to provide Transition to Support (developmental funding) and Support Organization (operational funding) to both the IRB process as well as the budget cycle process. Providing an initial estimate is only the start of the process. The estimates must be updated annually for both the IRB and the budget process as the requirements of the new solution become more apparent.

It is also important to note that TTS and operational funding estimates are highly variable due to the complexity of the new solution.

C.2 ESTIMATING COMPONENTS

Estimating components include:

- Manpower by skill class
- Special Training Requirements
- Hardware, Software, Communications, and Licensing Costs
- Office Space
- Contract Loading Fees

C.3 SCHEDULING CONSIDERATIONS

C.3.1 Vision Phase

The SFA TTS Lead, an IPT TTS Lead, and a junior assistant are required to:

- Provide TTS estimates to the Business Case
- Provide operational funding estimates to the Business Case
- Coordinate the selection process for the support organization

C.3.2 Definition Phase

The manpower effort during this phase is relatively light – 0.5 FTE.

C.3.3 Construction Phase

The manpower effort during this phase includes:

- Managerial (SFA and IPT TTS personnel and an assistant)
- Approximately 1 out of 5 developers being available for 4 weeks in order to:
 - Become familiar with the development work of others
 - Document the development work of the group of developers that the selected developer is representing
 - Brief the support organization individual chosen to acquire the information gathered by the selected developer
 - Be available for questions from the support organization individual chosen to acquire the information gathered by the selected developer
- Approximately 1 support person for each 5 developers being available for one week in order to:
 - Receive a briefing from the developer organization individual selected to be responsible for a particular aspect of the solution
 - Digest the information received
 - Be able to ask additional questions to the developer organization individual selected to be responsible for a particular aspect of the solution



Approximately 1 for 1 equivalence for help desk individuals for 1 week

In new solution software there may be no help desk structure in place. If there is no help desk structure, then an equivalent structure should be found.

Approximately 1 for 1 equivalence for special positions such as network and security for 1 week

Approximately 1 to 2 weeks of training for rare skills (such as Rational software for the Configuration Management librarian)

C.4 FINANCIAL CONSIDERATIONS

C.4.1 General Considerations

IT manpower costs are very volatile depending on the rareness of a particular skill. Loading fees, office space, and IT hardware, software, and licensing fees also vary by vendor and type of contract. In the Vision phase, the best estimate available is probably the historical cost of a similar type and size of project adjusted to any special factors for that project. As time passes the initial estimates can be adjusted due to both a better understanding of the manpower/skill requirements and the market.

C.4.2 Application to multiple release situations

Transition to Support addresses the external change of prime contractor from the developer to a supporter. The requirements for a multiple release development/support situation are less stringent than for a total change of contractors. However, for the first release of a multiple release development, a multiple release developer will have to review the same financial considerations and ensure that there is sufficient funding.